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ABSTRACT

In 1983 a number of reports were issued calling for the reform of elementary and secondary education in the United States. This paper describes a methodology for a study that will compare and contrast reliable information across the southeastern states about the implementation of actual reform initiatives, using a framework of 41 major categories of reform, derived from commissioned reports, statewide reform plans and legislative bills, oversight committees and evaluation reports, and reports issued by state boards or departments of education. For each category, each state will be analyzed to determine whether that reform initiative has been proposed, mandated, or implemented. These results will be captured in summary fashion in a separate document for each state. A sample page from one of these state summary reports is included. Other documents to result from the study will include (1) a detailed description of reform in southeastern states, which refers notations for each state to the appropriate state report or legislation; (2) a survey of reform efforts across all of the states under investigation; and (3) an analysis of specific educational reforms across states, emphasizing timing, implementation, results, and problems. References are included. (TE)

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A Study of Educational Reform in the Southeast: Application of a Methodology to Map and Track Educational Reform

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Paper Presented at the Annual Meetings of the
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Introduction

In 1983 a number of reports were issued calling for the reform of elementary and secondary education in the United States. These included:

- Academic Preparation for College (Educational EQuality Project, College Entrance Examination Board, 1983);
- Action for Excellence (Task Force on Education for Economic Growth, Education Commission of the States, 1983);
- A Nation At Risk (National Commission on Excellence in Education, U.S. Department of Education, 1983);
- Educating Americans for the 21st Century: A Plan of Action for Improving Mathematics, Science and Technology Education For All American Elementary and Secondary Students So That Their Achievement is the Best in the World by 1995 (National Science Board Commission on Precollege Education in Mathematics, Science and Technology, 1983);
- Education and Economic Progress: Toward a National Education Policy (Carnegie Corporation, 1983);
- High School: A Report on American Secondary Education (Carnegie Foundation for the Advancement of Teaching, 1983); and
- Making the Grade (Task Force on Federal Elementary and Secondary Education Policy, Twentieth Century Fund, 1983).

Following these initial calls for action, there were several reports summarizing educational reform efforts by the states, and national and local organizations. These included:

- Meeting the Challenge: Recent Efforts to Improve Education Across the Nation (National Commission on Excellence in Education, U.S. Department of Education, 1983); and
- The Nation Responds: Recent Efforts to Improve Education (U.S. Department of Education, 1984)

More recently, there has been a second wave of national reports which have indicated the necessity for major educational reform efforts beyond those already underway. Most of these reports have focused on teachers and the teaching profession. These reports include:

- o Time for Results: The Governors' 1991 Report on Education (Center for Policy Research and Analysis, National Governors' Association, 1986);
- o A Nation Prepared: Teachers for the 21st Century (Task Force on Teaching as a Profession, Carnegie Forum on Education and the Economy, 1986);
- o Tomorrow's Teachers: A Report of the Holmes Group (Holmes Group, 1986);
- o Who Will Teach Our Children?: A Strategy for Improving California's Schools (California Commission on the Teaching Profession, 1985); and
- o What's Next? More Leverage for Teachers (Education Commission of the States, 1986).

These reports have stimulated a number of statewide reform efforts. In turn, a number of different researchers have been carefully examining educational reform efforts within a limited number of states (Kirst, 1987; Timar and Kirp, 1986) or in general across all states (Seigel, 1983; Watchke, 1984; Education Commission of the States, 1983 and ongoing; U.S. Department of Education, 1984). The former studies involve on-site observations and contain considerable depth. The latter studies rely of self-reports or survey responses and concentrate on breadth of coverage. Neither procedure has resulted in information which can be easily used to compare and contrast reliable information across a significant number of states about the actual reform initiatives being implemented.

Methodology

The present study utilizes a framework for capturing reliable information in a form which allows for an easy comparison of reform efforts between a grouping of states. The framework is based on a listing of reform initiatives that has been allowed to emerge from the study of reforms in a series of states in the Southeast. The resulting categorization schema consists of 41 major categories with subcategories defined where necessary. This categorical schema is presented as Exhibit 1. There are 57 second-level categories, 17 third-level categories, and 21 fourth-level categories.

Survey data have been found to be generally unreliable in previous studies of reform efforts. Therefore, this methodology begins with documented evidence in the form of commissioned reports, statewide reform plans and legislative agendas, legislative bills, oversight committee and evaluation reports, and

EXHIBIT 1
Educational Reform Categorization Schema

1. Administrators
   a. Career Ladders
   b. Certification
      (1). Increased admissions standards
   c. Evaluation
   d. Elected/Appointed
   e. Merit Pay
   f. Professional Development
   g. Salary Increases
   h. Selection Process
2. Adult Education
3. At-risk Students
4. Bilingual Education
5. Capitol Outlay
6. Class Size
7. Collective Bargaining
8. Compensatory Education
9. Critical Need Areas
10. Dropout Prevention
11. Education Research
12. Extended Education
   a. Longer School Year
   b. Longer School Day
13. Extracurricular Activities
   a. No Pass/No Play
14. Higher-Order Thinking Skills
15. Illiteracy Prevention
16. Incentive Grants
17. Innovation Grants
18. Instructional Supplies
19. Kindergarten
   a. Availability
   b. Attendance Requirement
   c. Full Day Participation
   d. Mandatory Attendance
20. Major Education Reform Package
21. Parent-Teacher Conferences
22. Remedial Education
   a. Pre-School/Head Start
23. Rural Education
24. School Accreditation
25. School Age Child Care
26. School Boards
27. School Districts
   a. Consolidation
   b. Evaluation
   c. Incentive Programs
28. School Finance
29. School Quality
   a. Incentive Programs
30. Student Requirements
   a. General
      (1). attendance
      (2). discipline
      (3). homework
      (4). promotion/retention
      (5). testing
      (6). uniform curriculum
   b. Elementary Level
      (1). basic skills
   c. Junior High School
      (1). increased requirements
         (a). arts
         (b). computer sciences
         (c). English
         (d). foreign languages
         (e). health
         (f). math
         (g). physical education
         (h). science
         (i). writing
         (j). other
      (2). minimum basic skills
      (3). applied situation skills
   d. Secondary Level
      (1). endorsement/concentration
      (2). increased graduation requirements
         (a). arts
         (b). computer sciences
         (c). English
         (d). foreign languages
         (e). health
         (f). math
         (g). physical education
         (h). science
         (i). social studies
         (j). writing
         (k). other
      (3). minimum basic skills
      (4). applied situation skills
31. Summer School

EXHIBIT 1 (Cont.)
Educational Reform Categorization Schema

32. Teacher Certification
    a. Course Requirements
    b. Emergency Certification
    c. Lateral Entry Programs
    d. Master's Degree Entry
    e. Mentor/Intern Programs
    f. On-the-Job Testing
    g. Pre-Major Testing
    h. Professional Development
    i. Certification Review
    j. Entry Level Testing
    k. Testing for Renewal
33. Teacher Education
    a. Evaluation
    b. Critical Need Areas
    c. Internship Programs
    d. Scholarship Programs
34. Teacher Evaluation
    a. Existing Teachers
    b. New Teachers
35. Teacher Incentives/Recruitment
    a. Career Ladder Programs
    b. Equity Ceiling
    c. Loan Forgiveness Programs
    d. Master's Degree Programs
    e. Non-Teaching Duties
    f. Project/Grant Incentives
    g. Salary Increases
        (1). Across-the-Board
        (2). Merit Pay
    h. Scholarships
    i. Staff Development
    j. Teacher Benefits
    k. Teacher Recognition/Rewards
    l. Teacher Recruitment Efforts
36. Teacher Requirements
    a. Study Habits
    b. Time-on-Task
    c. Work Day/Work Week
37. Technology
38. Tenure
39. Urban Education
40. Vocational Education
41. Voucher Systems

reports issued by state boards or departments of education. From these documents, the initial categorization activity is completed.

For each category at its lowest level, each state is analyzed to determine whether that reform initiative has been proposed, mandated, and/or implemented. These results are captured in summary fashion in a separate document for each state. A sample page from one of these State Summary Reports is presented as Exhibit 2. Where possible, summary comments are provided to summarize reforms.

Another document, entitled "Description of Reforms in SEIL States," provides details which reference notations for each state to the appropriate state report or legislation. In many instances a state contact person is indicated who can be contacted for additional information. A sample page from this document is presented as Exhibit 3.

A third document maps reform efforts across all of the states under investigation.

Once drafts of each of these documents have been developed, they are shared with governor's and legislative education policy aides, oversight committee and evaluation personnel, and state department of education personnel for review. Final changes are made where documented evidence can be provided.

A second level of analysis will involve the tracking of specific educational reforms across states. Emphasis will be on timing of implementation, results of any pilot testing phases, problems encountered in funding or implementing the reform (and their resolution), plus any information that could assist other states interested in instituting that reform.

Results

The application of this methodology is being completed in six southeastern states comprising the region for the Southeastern Educational Improvement Laboratory: Alabama, Florida, Georgia, Mississippi, North Carolina, and South Carolina. These states provided a good test of the methodology. Three states have developed a major educational reform plan:

- A Plan for Excellence (Alabama, 1984);
- An Action Plan for Education (Georgia, 1984); and
- Education for Economic Growth (North Carolina, 1984).

Three states have passed a major education reform act:

- **Quality Basic Education Act** (Georgia, 1985);
- **Education Reform Act** (Mississippi, 1982); and
- **Educational Improvement Act** (South Carolina, 1984).

Florida has not had a major statewide plan or one large educational improvement act. However, it has passed a very sweeping series of educational reforms.

The discussion that follows is not meant to be exhaustive of the comparisons to be found across educational reform initiatives in the Southeast. That is not the purpose of this paper which is to demonstrate the effectiveness of this methodology. However, it is somewhat exemplary of these efforts.

EXHIBIT 2
Sample Page From a State Summary Report

FLORIDA EDUCATION REFORMS	Date Proposed	Date Approved	Date Implemented	Comments
1. ADMINISTRATORS				
A. Career ladders				
B. Certification (1) increased admission standards				
C. Evaluation	1981			Mgmt Training Programs
D. Local superintendents				
E. Merit pay				
F. Professional development				
G. Salary increases				
H. Selection	1981			Merit retention of Superintendent
2. ADULT EDUCATION	1981			Fla. Adult General Ed Act
3. AT-RISK STUDENTS				
4. BILINGUAL EDUCATION				
5. CAPITOL OUTLAY				
6. CLASS SIZE	1981		in process	Primary Ed Program, reduced class size in early grades
7. COLLECTIVE BARGAINING	1981			Unfair Labor Practice Fine
	1981			Rule Conflict
	1981			Wages and Hours
8. COMPENSATORY EDUCATION	1981			Increased funding of 2.9M

EXHIBIT 3
Sample Page From the "Description of Reforms" Report

4. BILINGUAL EDUCATION

Georgia

Contact Person: Coordinator, Migrant and Bilingual Education, Georgia Department of Education, Twin Towers East, Atlanta, GA 30334. (404) 656-4995.

5. CAPITOL OUTLAY

Georgia

Georgia provided a $9.3 million increase in funding for capitol costs in 1981. (Summary, Education Legislation and Funding, 1981 Session)

The Quality Basic Education Act of 1985 mandated that each school system provide five-year projections of capitol costs. (QBE Summary, pp. 11-12)

The Quality Basic Education Act mandated that school systems be provided with financial help to construct middle schools. (QBE Summary, p. 14)

The Georgia Association of Educators proposed that the legislature provide $19.9 million for the construction of middle schools. It claims that research has shown that students develop better if they attend a middle school between elementary school and high school. (The Update, May 1987, p. 4)

Mississippi

Senate Bill 2117 established that a petition with either 1500 signatures or 20% of the population can require that a bond issue be brought up for a vote by the public. The bond issue needs to pass by a three-fifths majority. (Summary of Major Legislation, 1986, p. 23)

The state board mandated in 1987 that bonding legislation which requires a petition before a bond issue can be voted on be removed before that year is over. (Five-Year Plan, p. 4)

The state board also mandated in 1987 that equitable state funding be provided in lieu of bonds by 1989. (Five-Year Plan, p. 4)

North Carolina

The Legislative Research Commission on Public School Facilities mandated that the state provide capitol outlay funds to help counties construct schools. (White multi-colored sheet, 1/86)

South Carolina

The legislature established criteria on the distribution of funds for capitol improvements. (1986 Cumulative Supplement to School Laws of South Carolina 1976, 59-21-420, pp. 83-84)

6. CLASS SIZE

Class Size. In Alabama, it was proposed in 1984 that all class sizes above 34 students be reduced. As of 8/14/87, legislation was on the Governor's desk to lower class size to 17 in grades K-4, 24 in grades 5-8, and 26 in grades 9-12. In Florida, class size reductions were adopted in 1981, 1984, and 1986. In Georgia, class size reductions were proposed in 1981, 1982, and 1984, and implemented in 1986 and 1987. In Mississippi, teaching assistants were provided in the first grade in 1983, in the second grade in 1984, and in the third grade in 1985. In North Carolina, class sizes were lowered in 1981, 1984, and 1986; one teacher aide was provided for every class of 26 students in grades 1-3 in 1985. In South Carolina, a reduction in class size was proposed in 1984, reducing class size to 30 in 1984, 28 in 1985, and 25 thereafter.

Dropout Prevention. The Southeast states with state-initiated dropout prevention reform initiatives are Alabama (1987), Florida (1984-86), Georgia (1984), Mississippi (1987), and North Carolina (1984; 1985).

Extended Education. In Alabama, the 175-day instruction year was enforced in 1985. In Florida, a longer school day in senior high school was proposed in 1983 because of increased math and science requirements; a pilot program for a 4-day school week was implemented in 1982; in 1984 a seventh period was implemented for high school seniors; a panel is exploring year-round schools. In Georgia, beginning in 1984 there must be 170 instruction days per year. In South Carolina, a 180-day instructional school year became effective in 1984.

Extracurricular Activities. In Alabama, extracurricular activities should not cut into instructional time beginning in 1984. In Florida, a 1.5 G.P.A. was required for participation beginning in 1984. The Georgia State Board of Education passed a no pass/no play rule in 1987. Mississippi's High School Activities Association passed a no pass/no play provision in 1987. In South Carolina, students must pass four academic classes and have a passing average for the preceding semester to participate in extracurricular activities, and a no pass/no play provision also was passed in 1984.

Kindergarten. Statewide availability of Kindergarten with mandatory attendance in Alabama began in 1984, with a capital outlay available for classrooms. Florida developed early admission criteria for Kindergarten in 1981, but repealed them in 1983. In Georgia, enrollment is not mandatory, but attendance is for enrolled students (effective 1985) and full-day Kindergarten (4-1/2 instructional hours) must be offered by 1987. Mississippi implemented a nine month, full-day, mandatory Kindergarten program beginning in 1986.

Remedial Education. Alabama is implementing a remedial education program. In 1986, Georgia implemented a 413.4 million program requiring remedial education for all students scoring below the 25th percentile in grades 2-5 or grade 9, or below a basic skills cutoff level in grades 10-12. North Carolina has implemented a required summer school program for students in grades 3, 6, and 8 who fail to meet state promotion standards. In South Carolina, $4.3 million were reallocated from grades 1-7 to grades 7 and 8 for remedial education; remedial education mandated for high school sophomores failing the basic skills test or 10th grade exit exam. Also, South Carolina began head start programs in 1984 offering 1/2 day of school for 4-year olds who might not be prepared to start Kindergarten.

School Accreditation. Alabama has mandated that all schools should meet accreditation standards, but this has not yet been implemented. Mississippi is developed a performance-based school accreditation system which has been pilot tested, with full implementation now underway.

School Boards. In 1984, Alabama implemented programs to orient local school boards by the State Superintendent and assist them with their plans for school improvement. The QBE Act in Georgia mandated local school board training, which was implemented in 1986.

School District Consolidation. In Alabama, it has been recommended that it may be necessary to consolidate high schools with less than 300 students to provide quality athletic programs. In Georgia, the legislature has agreed to pay the capitol costs of consolidating school districts that meet certain criteria. In Mississippi, the ERA of 1982 mandated that the State Education Finance Commission survey schools and make school consolidation recommendations; although the study was completed, the mandate for school consolidation was repealed by the legislature.

School District Evaluation and School Quality. In Alabama, the State Board of Education is developing criteria to identify poor quality schools. In Georgia, school district and school building evaluations will be phased in beginning in 1987; schools will be evaluated every five years by specially hired and trained state employees. In Mississippi, a performance-based accreditation system is being pilot tested. In North Carolina, high quality schools are mandated to be Centers for Excellence. In South Carolina, schools are evaluated and rewarded based on criteria such as student attendance, achievement, attitudes towards learning, parent participation, and teacher attendance when compared to comparable districts. Also in South Carolina, special steps are taken when a district is evaluated to be seriously impaired.

School Finance. Each of the six states had at least one major school finance initiative.

Student Attendance. Georgia established home study regulations in 1984. Mississippi required mandatory attendance for 6-8 year olds in 1982 and raised the mandatory upper-limit attendance age by one year each year until 1989. This schedule was accelerated so that mandatory attendance by 1987 was required of all students until age 16 and the legislature provided funds for attendance officers. Georgia has adopted a uniform school district system for addressing absenteeism, including intervention strategies, and now leads the country in having the highest attendance rate.

Student Promotion and Retention. In Alabama, the State Board of Education has been mandated to establish minimum learning goals and require student course-work completion for promotion. Both promotion policies and subject matter mastery have been studied in Mississippi, with legislation passed in 1987 providing for out-of-state transfers at the same grade level providing certain criteria are met. North Carolina has developed promotion standards, mostly test based, for grades 3, 6, and 8, with required summer school or retention for students who fail to master skill levels. South Carolina has adopted the same policy, but also includes grades 1 and 2.

Student Testing. All six SEIL states have implemented or increased their statewide testing programs. These programs are briefly summarized below:

State	Grade Level K	1	2	3	4	5	6	7	8	9	10	11	12
Alabama		A	A	C	A	A	C	A/C	A/C		A/G		
Georgia		R/C	A*	C*	A		C	A	C	A	C/G		
Mississippi	A	A	A*	C/A*	A	C			C			C	
North Carolina		A	A	A/C			A/C		A/C		G		
South Carolina		C	C	C			C		C		G		

[KEY: A = Norm-referenced achievement Test; C = Competency-based, basic skills, or criterion-referenced test; R = Readiness test; G = Graduation examination; * = Sample of students only]

Student Increase in Graduation Requirements. Each SEIL-member state has increased its graduation requirements as part of its school reform efforts. In Alabama, the number of credits required for graduation was increased from 20 to 22 in 1985. Florida raised its graduation credits to 22 in 1984 and then to 24 in 1986, with 3 each in math and science and at least two of the science courses involving labs. Beginning in 1988, Georgia is requiring 21 graduation credits, with increases in math, science, English, and social studies. Mississippi increased the credits required for graduation from 16 to 18 in 1987. North Carolina increased standard graduation credits from 18 to 20 in 1984, and for NC Scholars from 20 to 22. South Carolina increased its graduation credits to 20 credits in 1984, with 3 credits each required in math and in science.

Teacher Career Ladders. Each SEIL-member state has at least proposed a teacher career ladder plan. In Alabama, 1985 legislation to develop a career ladder plan was recently repealed. In Florida, the Ray Stewart Career Achievement Program for Teachers was begun in 1986 after the Master Teacher Program, begun in 1986, was abolished. Georgia has developed a detailed career ladder draft plan, but the plan has not yet begun implementation. The State Board in Mississippi mandated that a career ladder program be established by 1989, but to date has only implemented the beginnings of an educator evaluation plan. North Carolina is presently piloting its career ladder efforts, which include both seniority and merit pay components. South Carolina is pilot testing its career ladder program as part of its teacher incentive program, based on a point reward system.

Teacher Certification. SEIL-member states have developed a number of new teacher certification strategies. These include entry-level testing (Alabama, 1984; Georgia, 1978; Mississippi, 1982; North Carolina, 1984); lateral entry procedures (Alabama, 1985; Georgia, 1986), on-the-job testing (Georgia, 1980; Mississippi, 1987); pre-major testing (Alabama, 1984; South Carolina, 1984); and testing for certificate renewal (Georgia, 1986).

Teacher Salaries. Alabama provided an across-the-board salary increase in 1984. Georgia teachers received a 9 percent cost of living increase in 1981, 15, 10, 5, and 8 percent salary increases in 1982, 1984, 1985, and 1986.

Mississippi teachers received a $1,000 increase in 1985 with a large increase proposed for 1988. North Carolina teacher salaries have increased annually, from an average of $15,861 in 1980 to $22,340 in 1985. Teacher salaries in South Carolina are now mandated to be competitive with those of teachers in the Southeast, and have risen from an average salary of $17,384 in 1983 to $24,404 in 1987.

Teacher Recruitment. Florida, North Carolina, and South Carolina all have established statewide teacher recruitment programs. Georgia has appointed a Consultant for Teacher Recruitment within the State Department of Education.

Discussion

The framework has proven to be an effective method of collecting and organizing information about educational reform in the Southeast. The mapping efforts are in the final stages of completion, and tracking efforts will begin soon.

An obvious benefit of the mapping activity to date has been the ease of comparing and contrasting educational reform efforts in the Southeast. States can readily identify where similarities and differences occur with reform activities in neighboring states, and the tracking activity can reveal the points at which problems tend to emerge in implementing particular reforms.

Although a few studies have explored educational reform in depth, they have been able to do this within a limited number of states (usually three to six states). Some studies have concentrated on a single or just a few types of reform (e.g., the study of career ladder programs by the Southern Regional Education Board). Most other studies which have attempted to capture a national review of educational reform have had to depend on survey data, which have been found to be quite unreliable.

Therefore, a methodology is needed which can reliably capture the breadth of educational reform, while providing sufficient detail to compare and contrast reforms across states and regions. The authors have found the methodology reported in this study to be robust enough to achieve this outcome.

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